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October 21, 2008

AGENDA ITEM 5

TO: MEMBERS OF THE BENEFITS AND PROGRAM ADMINISTRATION COMMITTEE

- I. SUBJECT:** 2008 Member Satisfaction Survey Results
- II. PROGRAM:** Member and Benefit Services Branch
- III. RECOMMENDATION:** Information Only
- IV. ANALYSIS:**

The Member Services Division in collaboration with Michael Strategic Analysis, prepared, administered and analyzed the 2008 CalPERS Member Satisfaction Surveys. The surveys covered three specific program areas within the Member Services Division: 1. Retirement Estimates; 2. Community Property; and 3. Service Credit Purchases. The focus of the surveys, conducted by telephone, was to measure the knowledge, attitudes and practices of CalPERS members, claimants, and attorneys relating to these important core services.

Separate surveys were prepared for each of the program areas and were conducted over a two-month period in June and July of 2008. The findings were released in August 2008. Each survey consisted of approximately 38 questions directed specifically to members who were identified as actually having received one of these three services. The survey group consisted of 1,200 respondents (including 200 attorneys), selected as follows:

- Retirement Estimates Survey
400 CalPERS members who either requested or received a retirement estimate from CalPERS in 2007 or 2008.
- Community Property Survey
400 CalPERS members, claimants against CalPERS members, and members' or claimants' attorneys who inquired about community property matters in 2006, 2007 or 2008.

- Service Credit Survey
400 CalPERS members who submitted a request to CalPERS to purchase service credit in 2007 or 2008.

Most questions requested responses on a 1-to-10 rating scale, with 10 being the highest possible satisfaction rating.

Overall, these CalPERS services and products are rated highly by our members, claimants and attorneys. The following are highlights of the survey:

Retirement Estimates

- The overall average satisfaction rating with the retirement estimates experienced by members is 8.2.
- Respondents rated accuracy, clarity, timeliness and usefulness of CalPERS' retirement estimate information as "High".
- Respondents rated ease of use of the request form and the amount of information provided as "Very High".
- The one-sixth of respondents who had spoken directly with the Retirement Estimate Unit rated the Unit "High" to "Very High".
- Users rated ease-of-use of the on-line retirement planning calculator as "High" to "Very High".
- Mail is the leading method of contacting CalPERS for retirement estimates.

Community Property

- Overall average satisfaction rating for handling Community Property matters is 7.9. A separate survey instrument was used for attorneys and member/claimant sub-samples:
 - Members and claimants = 7.4
 - Attorneys = 8.2
- Professionalism of CalPERS staff ranks high at 7.8
- Three-fourths of members and claimants used the telephone for their first contact on community property matters.
- Attorneys preferred interacting with CalPERS via mail.
- Members and claimants contacted CalPERS an average of four times on a case; attorneys did so an average of fourteen times per case.

Service Credit Purchases

- Overall average satisfaction rating by members receiving service credit information is 7.9.
- Respondents who spoke to a staff member about additional service credit gave "High" to "Very High" ratings on all aspects of customer service, with 85% rating overall service as excellent or good.

- 61% of members, who requested a cost estimate to purchase additional service credit, later elected to purchase the service credit.
- 50% of members utilized the on-line calculator to obtain a cost estimate prior to submitting an official request.
- 50% of respondents used a tax-deferred, plan-to-plan transfer or rollover to purchase additional service credit.
- Respondents' main sources of first information about additional service credit are coworkers, employers, CalPERS workshops, family and friends in that order.

V. STRATEGIC PLAN:

This project supports the CalPERS Strategic Plan. Objective 4.1 of the CalPERS Three Year Business Plan states: "By December 31, 2009, 75% of the members and stakeholders surveyed will rate the value of CalPERS as good to excellent."

VI. RESULTS/COSTS:

There are no costs associated with this item.

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